

IN THE CLAIMS

Please amend claim 1, cancel claim 3, withdraw claims 7-14 and add claims 15-19 as follows.

1 1. (Currently amended) A computer-implemented method for preparing
2 tax returns comprising:
3 ~~obtaining, by a computer system, identification data identifying a~~
4 ~~taxpayer's employer;~~
5 ~~determining, by the computer system via communication over a~~
6 ~~communications network with a tax data provider associated with the~~
7 ~~taxpayer's employer, using the identification data and providing~~
8 ~~taxpayer authentication data to the tax data provider, that tax data~~
9 ~~about the taxpayer is available from [[a]] the tax data provider~~
10 ~~associated with the taxpayer's employer;~~
11 ~~electronically~~ retrieving, from the tax data provider, the tax data about the
12 taxpayer; and
13 ~~electronically~~ preparing a tax return for the taxpayer using the retrieved
14 tax data.

1 2. (Previously presented) The computer-implemented method of claim 1,
2 wherein the identification data identifying the taxpayer's employer is an
3 employer identification number (EIN).

1 3. (Canceled)

1 4. (Previously presented) The computer-implemented method of claim 1,
2 wherein determining that tax data about the taxpayer is available comprises:
3 querying a plurality of tax data providers with the identification data to
4 determine which of the tax data providers are associated with the
5 taxpayer's employer.

1 5. (Previously presented) The computer-implemented method of claim 1,
2 wherein determining that tax data about the taxpayer is available comprises:
3 identifying a plurality of employers providing tax data electronically; and
4 determining, using the identification data identifying the taxpayer's
5 employer, whether the taxpayer's employer provides tax data
6 electronically.

1 6. (Previously presented) The computer-implemented method of claim 1,
2 further comprising electronically filing the tax return with a taxing authority.

1 7. (Withdrawn) A computer-implemented method for preparing a tax
2 return, comprising:
3 determining, without tax payer intervention, a set of relationships
4 between a taxpayer and financial institutions from stored financial
5 data of the taxpayer;
6 using the set of relationships, automatically retrieving from each financial
7 institution, tax data stored by the financial institution and based upon
8 financial transactions between the taxpayer and the financial
9 institution;
10 automatically presenting to the taxpayer only retrieved incomplete tax
11 data;

12 obtaining from the taxpayer information for completing the incomplete
13 data, to form taxpayer completed tax data;
14 electronically, and at least partially, and without taxpayer intervention,
15 preparing an electronic tax return for the taxpayer using the retrieved
16 tax data and the taxpayer completed tax data.

1 8. (Withdrawn) A computer-implemented method for preparing tax
2 returns comprising:
3 importing taxpayer data from a financial management software
4 application;
5 determining automatically whether the imported taxpayer data is
6 complete; and
7 responsive to the imported taxpayer data being complete, automatically
8 preparing a tax return.

1 9. (Withdrawn) The method of claim 8, further comprising:
2 responsive to the imported taxpayer data being incomplete, alerting the
3 taxpayer and receiving information to complete the taxpayer data.

1 10. (Withdrawn) A system for preparing a tax return, comprising:
2 determining means for determining, without tax payer intervention, a set
3 of relationships between a taxpayer and financial institutions from
4 stored financial data of the taxpayer;
5 retrieving means, coupled to the determining means, for using the set of
6 relationships and automatically retrieving from each financial
7 institution, tax data stored by the financial institution and based upon

8 financial transactions between the taxpayer and the financial
9 institution;
10 presenting means, coupled to the retrieving means, for automatically
11 presenting to the taxpayer only retrieved incomplete tax data;
12 obtaining means, coupled to the presenting means, for obtaining from the
13 taxpayer information for completing the incomplete data, to form
14 taxpayer completed tax data;
15 preparing means, coupled to the obtaining means for electronically, and at
16 least partially, and without taxpayer intervention, preparing an
17 electronic tax return for the taxpayer using the retrieved tax data and
18 the taxpayer completed tax data.

1 11. (Withdrawn) A system for preparing a tax return for a taxpayer,
2 comprising:
3 an interview engine for obtaining taxpayer data from the taxpayer;
4 a user database, coupled to the interview engine, for storing taxpayer
5 data; and
6 an import subsystem, coupled to the interview engine, for electronically
7 importing tax data related to the taxpayer from an input source via a
8 communications network.

1 12. (Withdrawn) The system of claim 11, further comprising a default
2 profile database, coupled to the interview engine, for providing a plurality of
3 interview questions to the interview engine to be used for obtaining taxpayer
4 data from the taxpayer.

1 13. (Withdrawn) The system of claim 11, wherein the import subsystem
2 further comprises:

3 a universal data import engine for communicating electronically with a
4 plurality of import sources and retrieving tax data from the import
5 sources; and

6 a source database, coupled to the universal data import engine, for storing
7 import source information indicative of tax data provided by each of
8 the plurality of import sources.

1 14. (Withdrawn) A computer program product comprising:

2 a computer-readable medium having computer program logic embodied
3 therein for preparing tax returns, the computer program logic
4 comprising:

5 an interview engine for obtaining taxpayer data from the
6 taxpayer;

7 a user database, coupled to the interview engine, for storing
8 taxpayer data; and

9 an import subsystem, coupled to the interview engine, for
10 electronically importing tax data related to the taxpayer
11 from an input source via a communications network.

1 15. (New) A computer program product for preparing tax returns, the
2 computer program product stored on a computer-readable medium and
3 including program code to cause a computer system to carry out the steps of:
4 obtaining identification data identifying a taxpayer's employer;

5 determining, via communication over a communications network with a
6 tax data provider associated with the taxpayer's employer, using the
7 identification data and providing taxpayer authentication data to the
8 tax data provider, that tax data about the taxpayer is available from
9 the tax data provider;
10 retrieving, from the tax data provider, the tax data about the taxpayer; and
11 preparing a tax return for the taxpayer using the retrieved tax data.

1 16. (New) The computer program product of claim 15, wherein the
2 identification data identifying the taxpayer's employer is an employer
3 identification number (EIN).

1 17. (New) The computer program product of claim 15, wherein
2 determining that tax data about the taxpayer is available comprises:
3 querying a plurality of tax data providers with the identification data to
4 determine which of the tax data providers are associated with the
5 taxpayer's employer.

1 18. (New) The computer program product of claim 15, wherein
2 determining that tax data about the taxpayer is available comprises:
3 identifying a plurality of employers providing tax data electronically; and
4 determining, using the identification data identifying the taxpayer's
5 employer, whether the taxpayer's employer provides tax data
6 electronically.

1 19. (New) The computer program product of claim 15, further
2 comprising electronically filing the tax return with a taxing authority.